

OnPointe Risk Analyzer Launches AI-Engine to Instantly Parse Account Statements

OnPointe Risk Analyzer just solved the biggest shortcoming of investment risk tolerance software.

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[OnPointe Risk Analyzer](#), a leading provider of investment risk analysis and retirement planning software for financial planning professionals, announces a groundbreaking upgrade to its risk software: the launch of a fully operational AI-powered account statement parser that can extract data and build client portfolios directly from PDFs and images of account statements.



This release marks a transformational shift in financial data entry, eliminating the need for manual input or spreadsheet uploads and setting a new standard for advisor technology.

With this new feature, users simply upload PDFs or images of account statements into OnPointe where the AI system reads the document and extracts the investment data to create the client's portfolio.

To watch a video of how the AI parser works, go to: www.onpointeriskalyzer.com/ai-parser

"OnPointe Risk Analyzer just solved the biggest shortcoming of investment risk tolerance software by creating an AI-driven parser allowing users to upload portfolios with the click of a button, thereby eliminating the need to manually build client portfolios," stated [OnPointe Software](#) Co-Founder, Rocco DeFrancesco.

Once OnPointe's AI creates the client portfolio, it is automatically scored using OnPointe's proprietary market-calibrated risk methodology, delivering immediate insights into how the client's current holdings align with their personal Risk Score. The combined power of automated data intake and dynamic risk modeling gives advisors an unmatched edge in delivering custom-fit, data-driven advice.

Key benefits of the new AI-powered parser include:

- Uploading statements from virtually any custodian
- Intelligent mapping of positions, tickers, and values
- Instant portfolio creation with auto-risk scoring

This latest update reinforces OnPointe's commitment to pushing the boundaries of what's possible in advisor-facing sales/compliance software.

About OnPointe Risk Analyzer

OnPointe Risk Analyzer empowers financial advisors and wealth professionals with market-calibrated investment risk analysis, dynamic retirement income planning, and now, cutting-edge AI portfolio construction. By combining real-world risk methodology with intelligent automation, OnPointe enables advisors to deliver precision guidance tailored to each client's goals.

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